



AS YOU SOW

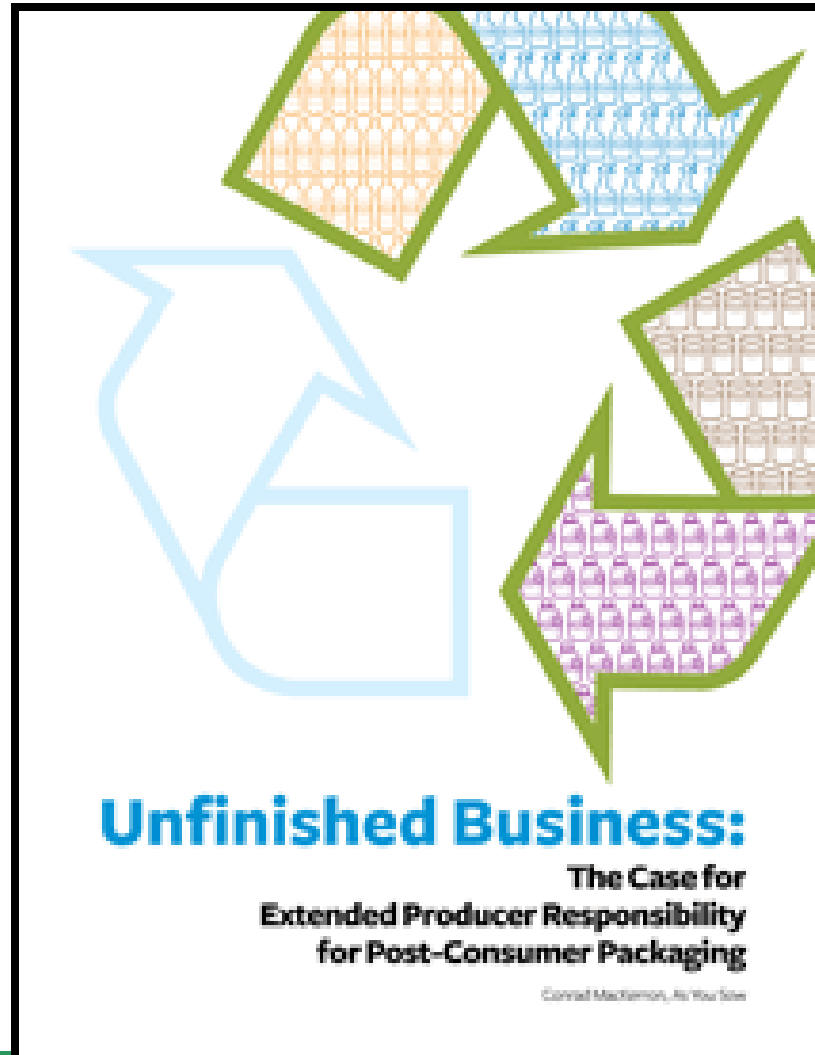
# Boosting Packaging Recycling Through Shareholder Engagement

Bay Area Trash Summit  
November 2013

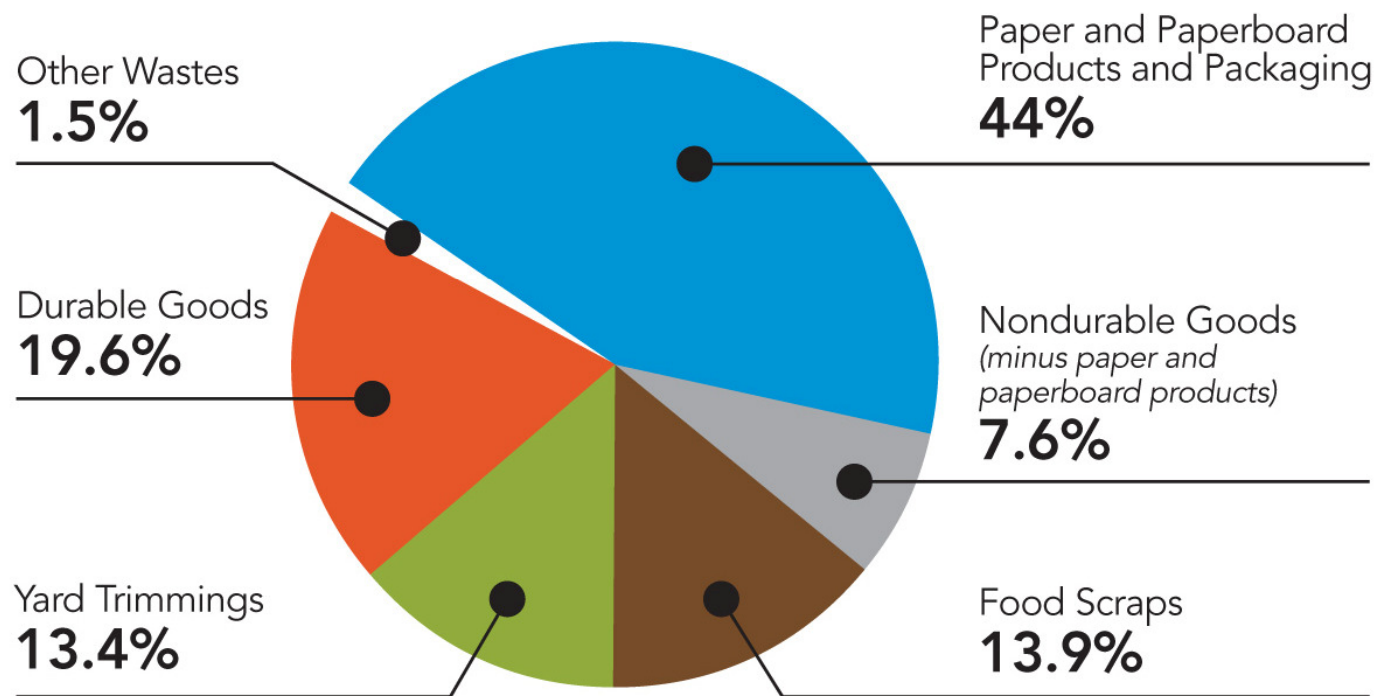
# As You Sow's Investor Allies



# Unfinished Business

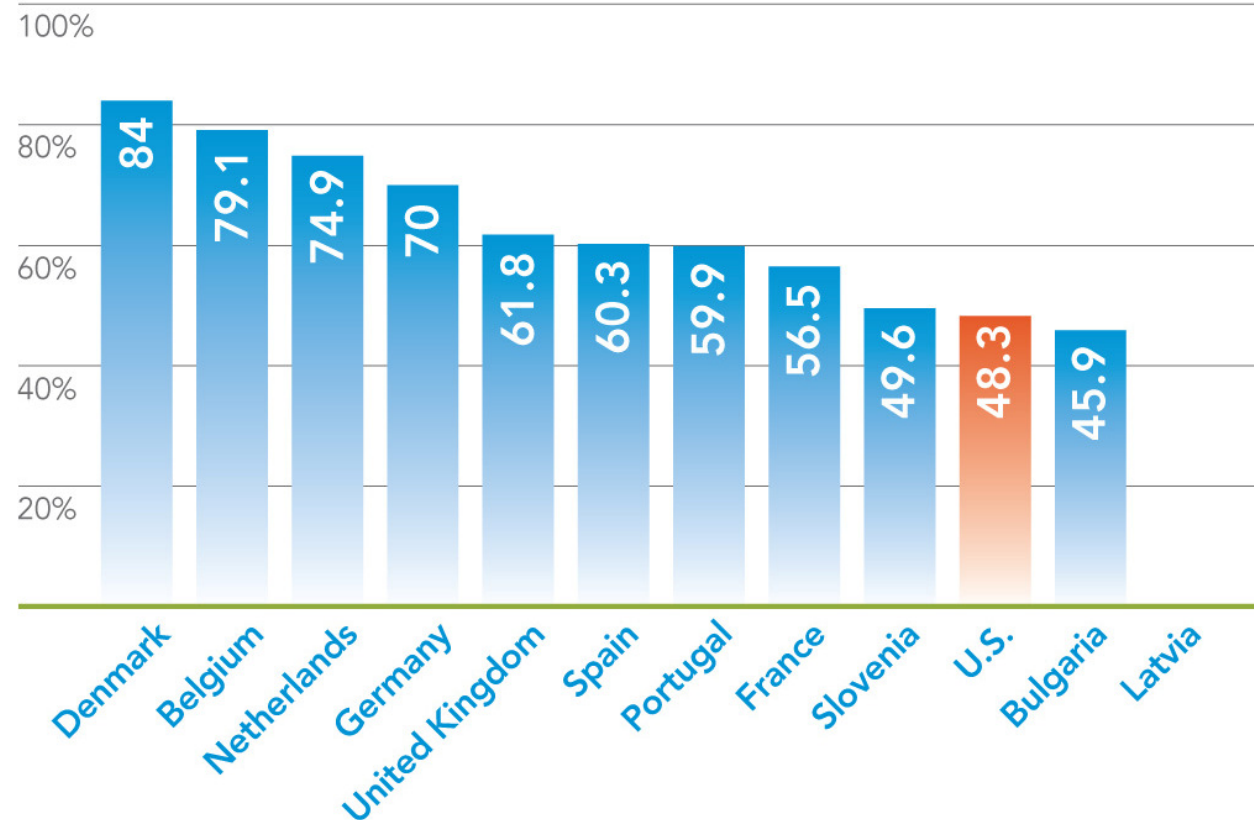


## Total U.S. Municipal Solid Waste Generation by Category



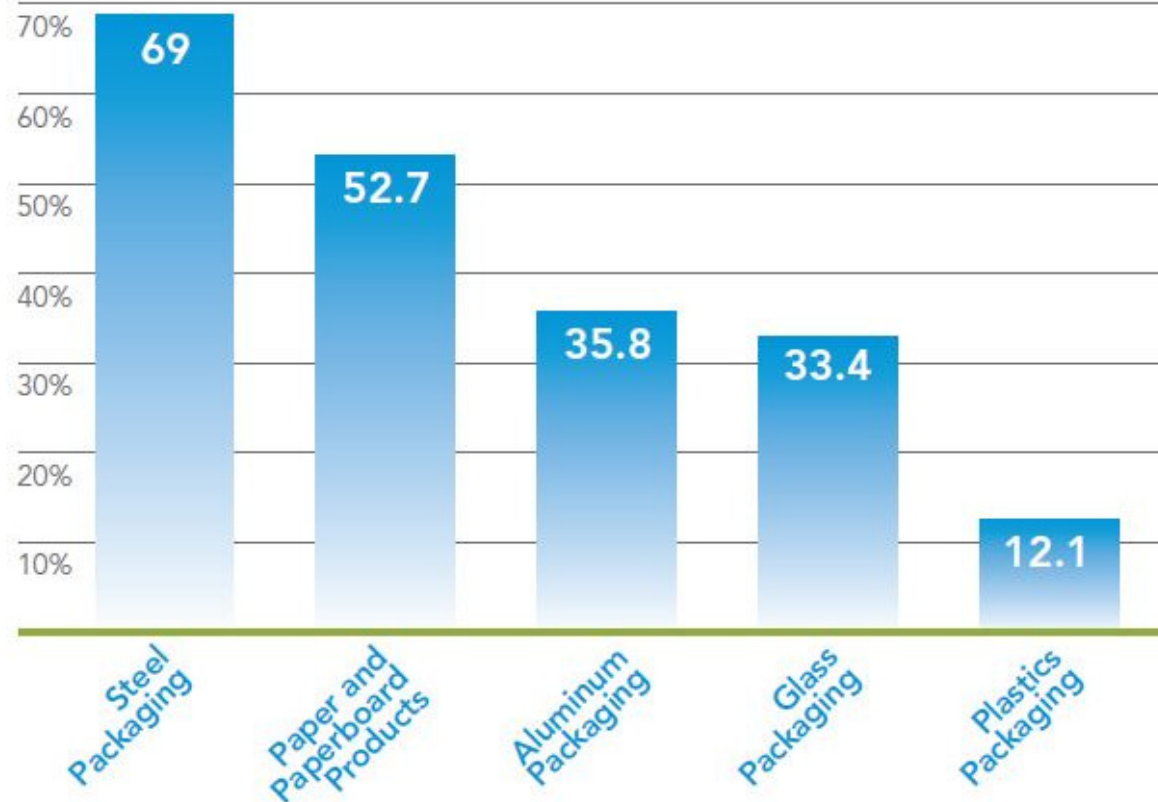
Source: United States Environmental Protection Agency, *Municipal Solid Waste Generation, Recycling, and Disposal in the United States: Facts and Figures for 2010*.  
Adjusted to combine containers with packaging and paper and paperboard.

## U.S. vs. European Packaging Recycling Rates



Sources: Eurostat, U.S. Environmental Protection Agency

## U.S. Packaging Recovery Rates for Selected Materials



Source: United States Environmental Protection Agency,  
*Municipal Solid Waste Generation, Recycling, and Disposal in the United States:  
Facts and Figures for 2010.*



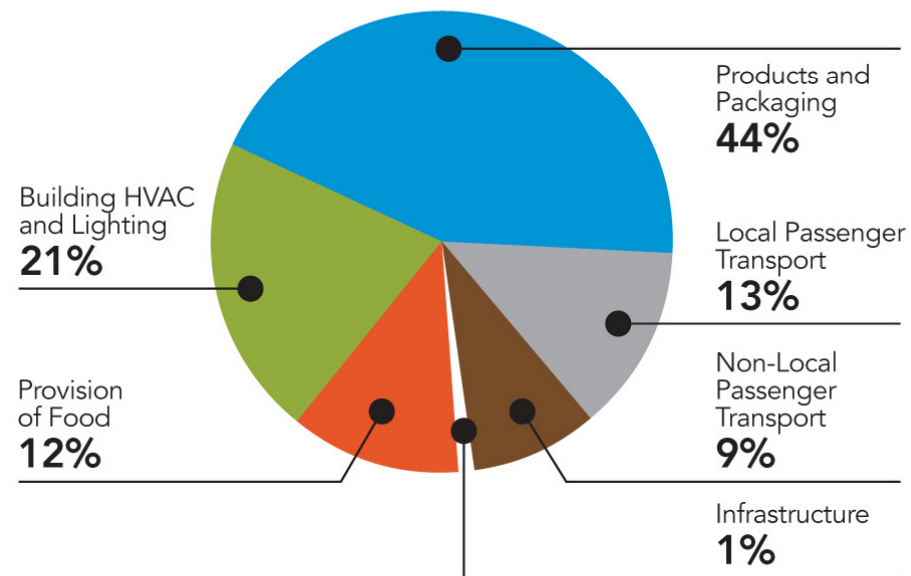
## Top 10 Ocean Debris Items



Source: Ocean Conservancy Ocean Trash Index

## Packaging Link to Carbon Pollution

**44%** of the U.S. greenhouse gas emissions come from products and packaging in a systems-based analysis.



Source: Joshua Stolaroff, "Products, Packaging, and U.S. Greenhouse Gas Emissions," Product Policy Institute, 2009.



# Lifecycle Analysis

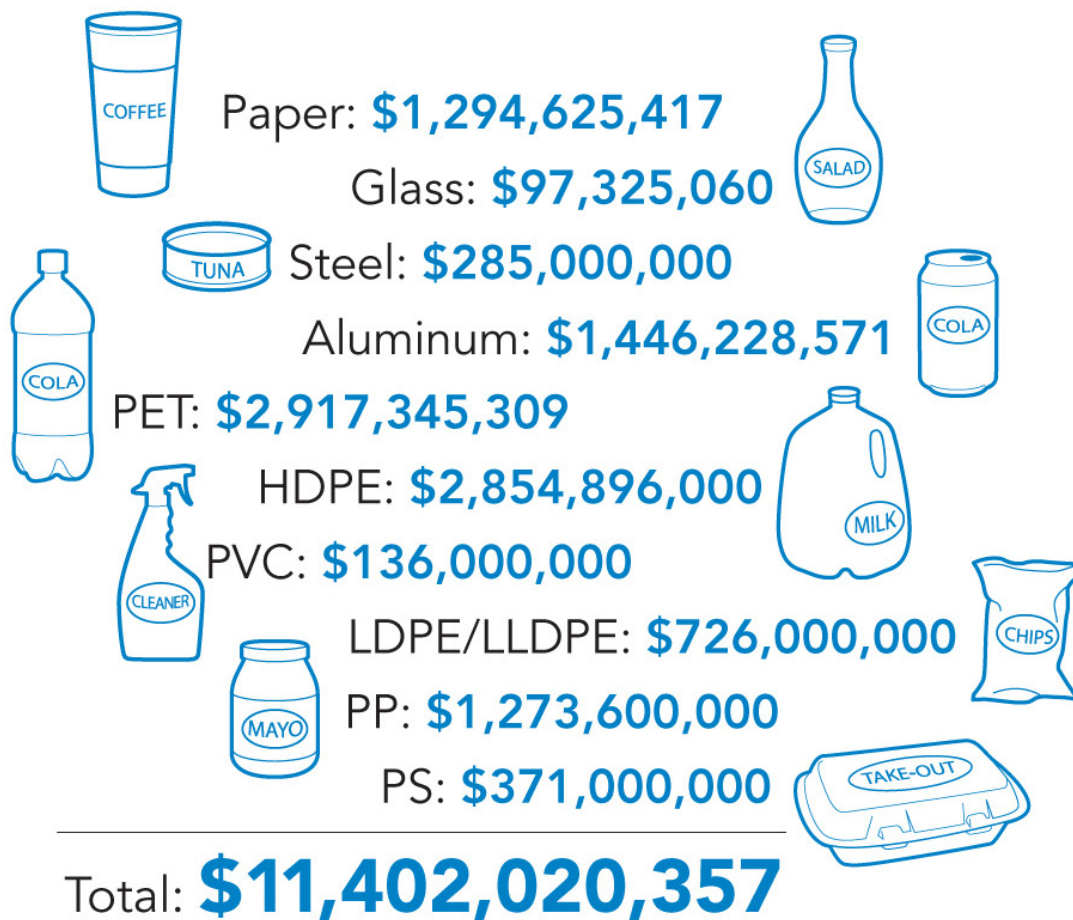
Nestle Waters – 55%



General Mills – 15%



## Value of Wasted Packaging Materials in the U.S.



Source: See Appendix 1 for methodology and plastic material definitions.

# PET Recycling: Economic Potential

- PET had highest commodity value potential in As You Sow study -- \$2.9 billion
- Companies willing to use high levels of PET
- U.S. PET Bottle recycling rate 29%
- U.S. PET reclaimers currently operate at less than 60% of capacity

# Fast Food Industry Engagement

## Source Reduction & Recycling



- McDonald's replaced foam with paper at 2000 West Coast outlets – recently announced total phase out
- Dunkin Donuts phasing out foam in 2-3 years
- Next: Packaging Recycling in restaurants

# Pret A Manger On-Site Recycling



# Proactive Efforts: Cups



- Jamba Juice phasing out foam cups this year
- Starbucks: Recycle all cups left in stores by 2015; also serve 5% of beverages in reuseables by 2015



# Source Reduction: Walmart

- Reduced plastic bag waste 38% since 2007
- Equivalent to 10 billion plastic bags
- 50% reduction in Brazil
- Response to bag ban campaigns
- Part of broader 5% reduction in packaging

# Plastic Source Reduction Project

- Three UC campuses - funded by EPA R9
- Reduce use of plastic packaging in dining facilities
- Work with fast food chain on campuses
- Less impactful alternatives for plastic bags, flatware, straws
- Partners are PSI, CWA, PPC, CPSC

# Is This Progress?

## Steel to Non-Recyclable Pouch



# Glass to Pouch



# Flexible plastics – pouches

- Global sales -- \$137 billion
- Projected \$163 billion by 2016
- Will surpass paper as most used packaging
- No viable recycling/end-of-life option
- William McDonough -“Monstrous hybrid”

# Pouch Proliferation





# As You Sow Dialogues



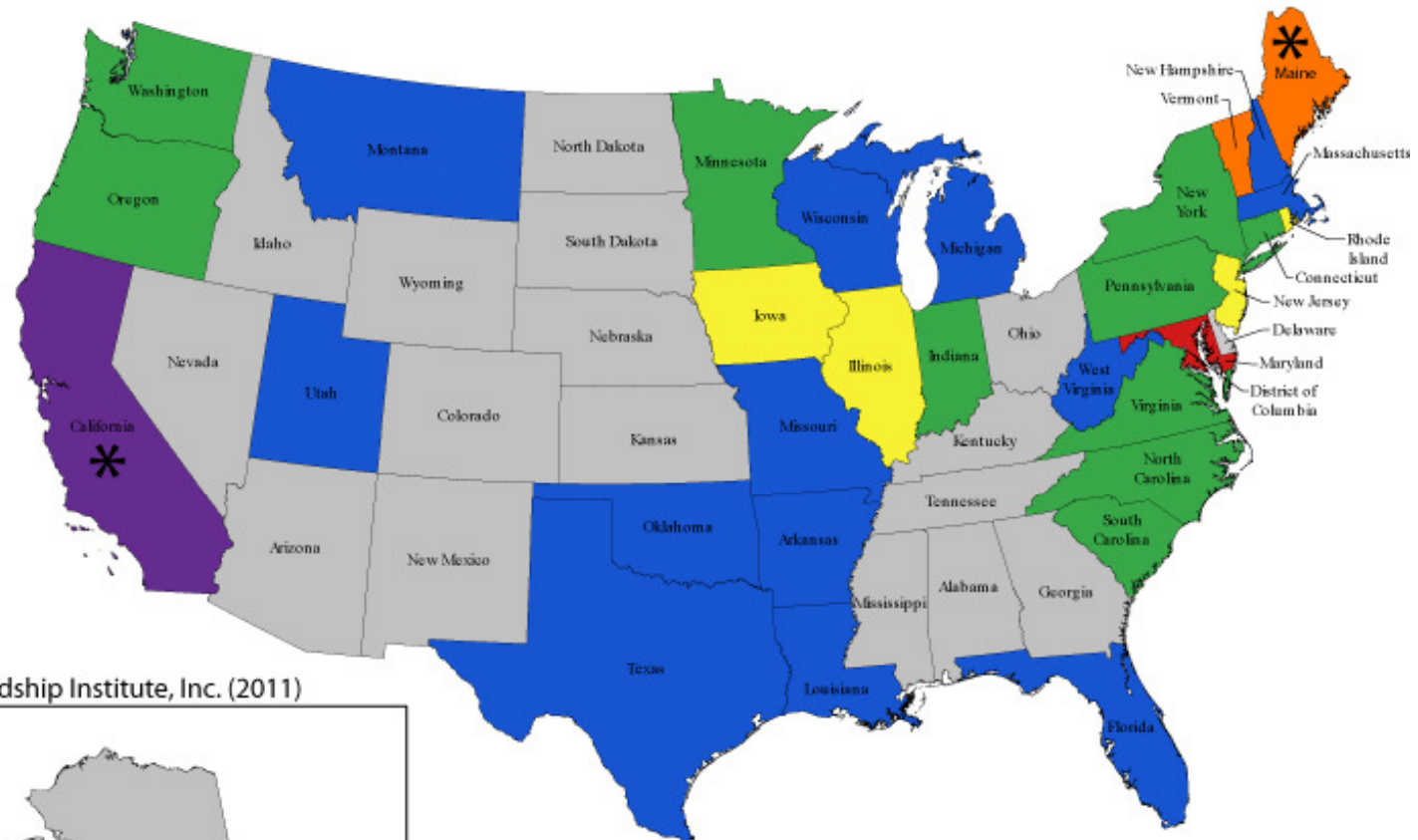
# Primary Drivers of EPR in U.S.

- Lack of industry leadership or responsibility for post-consumer packaging
- Value of wasted materials – **\$11.4 billion**
- State budget crises leads governments to back shifting costs to companies
- Significant contribution to carbon/energy footprint
- Companies starting to support EPR systems

# State Laws on EPR

## Product Categories

- Auto Switches
- Batteries
- Carpet
- Cell Phones
- Electronics
- Fluorescent Lighting
- Mercury Thermostats
- Paint
- Pesticide Containers



Source: Product Stewardship Institute, Inc. (2011)



## Number of Product Categories Covered by EPR Law



\* Other laws authorizing agencies to require EPR, including Framework laws.

# Post-Consumer Recycling: Corporate Commitment

Unilever Sustainable Living Plan: Increase recycling and recovery rates for post-consumer packaging by, on average:

- 5% by 2015
- 15% by 2020



# EPR Cost Modeling Study

Recycling Reinvented has commissioned cost modeling study for EPR in Minnesota

- Estimate available supply of materials
- Model optimized recycling system and estimate total system costs
- Three different fee scenarios

## Next Steps

- Consumer focused ***Make It Take It*** campaign by Cradle 2 Coalition
- As You Sow pressing companies to develop policies on post-consumer packaging
- Recycling Reinvented developing state legislation
- Try EPR in a couple of states





AS YOU SOW

## Contact

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*Thank you!*